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ABSTRACT

Designed for secondary school social studies teachers, this curriculum outline offers suggestions for teaching about the governance, cost, and sources of fiscal support for public education. Although the outline is specifically designed for use by teachers in Michigan, it can be adapted for use in any state. Arranged into five major sections, sections I and II present an introduction and some suggestions to the social studies teacher. In the third section topical questions, presented in outline form, lead students to examine the make-up of the local school board, the administrative structure of the district, teacher qualifications, the role of the city council in developing local school policy, the development of school district boundaries, historical antecedents of school district organization, the United States Constitution in education, the federal role in education, the cost of educating, sources of state and federal revenue for schools, issues surrounding school taxes, and teacher salaries. Background readings for the teacher are provided in section IV. The study unit concludes with a bibliography of sources intended to provide further background reading. (LH)

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THE GOVERNANCE, COST AND SOURCES OF FISCAL SUPPORT FOR PUBLIC EDUCATION IN MICHIGAN

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A CURRICULUM OUTLINE
FOR
SOCIAL STUDIES TEACHERS

SO 016 966

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MICHIGAN ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT

FEBRUARY 1985

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This study unit is provided as a service to the Michigan school districts by the Michigan Association for Supervision and Curriculum Development. Users should feel free to duplicate any part or all of it.

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February, 1985

THE GOVERNANCE, COST AND SOURCES OF FISCAL SUPPORT FOR PUBLIC EDUCATION IN MICHIGAN

A Curriculum Outline For High School Social Studies Teachers

I. Introduction:

Most experienced educators, elected officials and committed lay people have lived through the experience of trying to gain citizen support for educational financing or policies in the face of near total ignorance of the financial and governance structure of public education.

Unfortunately, this lack of fundamental public education on issues, very basic to the most critical of democratic institutions, generally surfaces during the heat and stress of school millage campaigns or major school policy shifts at the local, intermediate or state level. Who does run the schools? Where does the money come from? Sadly, after 13 years in public schools as a captive audience, our own "clientele" continue to ask these two fundamental questions with embarrassing frequency and at critical times.

This outline is offered as a service to Michigan's secondary social studies teachers by the Michigan ASCD in collaboration with the Michigan Council for the Social Studies.

Since the need to know is so frequently couched in question and answer format for adults at "millage time", the outline topics which follow are offered in that manner from the perspective of what a student might ask of his or her teacher.

II. Suggestions To Social Studies Teachers:

MASCDers are sensitive to such issues as the "crowded curriculum". We wouldn't be offering this brief teaching unit if we were not also aware that study of the local school districts is too frequently overlooked. So we do want you to do it.

The study unit logically fits into a government course, but it would be equally valid in civics, contemporary problems, Michigan History, or even as part of a "skills for living" offering since schools, taxes and educational plans are very much a part of such studies.

We offer the following suggestions and thoughts.

1. The unit lends itself well to the "student research-report to the group" strategy.

2. Your local school officials - Superintendent, Business Administrator etc. are knowledgeable, accessible and (we'd bet) eager to help you teach about your district as resource people. (In many cases, they'll have graphics and charts that they thought only school boards and citizens committees would look at.)

3. Make your local situation the top priority. The historical and statewide picture can be used to "flesh out" an understanding of how your local district fits the bigger picture.

4. Above all, <u>try it</u>. If nothing else, it will be great "professional PR" for you with the local management <u>and</u> the students may gain appreciation of what it takes to provide them an education. Good luck.

III. Topical Question Outline:

1. Who's my principal's boss?

   A. Make-up of Local Board

      1. Qualifications needed to run for local board.

      2. How does one go about running for board?

      3. Do board members get paid?

      4. Length of terms?

      5. Role of the local board, i.e., policy making vs. administration.

      6. Do individual board members have any power to run schools?

      7. Can I attend a board meeting and express my views on school matters?

   B. Administrative structure of the district

      1. Outline of titles and job responsibilities

      2. Whom do my parents contact if they want to complain about a problem in school?

         a. Is it all right to call the Superintendent directly? What are the proper channels for a citizen to follow to offer suggestions or to express dissatisfaction with school policies/ practices etc?

   C. Teachers

      1. How does one become a teacher? Educational requirements? Certification?

      2. Who decides what teachers teach?

III. Topical Outline - (Continued)

2. Why doesn't the city council/mayor tell the principals what to do?

A. Michigan Constitution of 1963

B. State Board of Education and its relation to:

1. Intermediate School District Board of Education

2. Local School Board

C. Distinction between city government and school boards

D. School Districts: creatures of the legislature, i.e., agencies of the State

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III. Topical Outline - (Continued)

3. Kids in the school come from two (or three) different cities and it's still all one school district. Why did they make such dumb school district boundaries?

A. Historical antecedents of school district organization.

1. Northwest Territories (Ordinances of 1785 and 1787)

a. Townships to set aside "sixteenth section" for sale to raise public money for "common schools".

b. "Religion, morality and knowledge being necessary to good government and the happiness of mankind, schools and the means of education shall forever be encouraged."

B. Community pride and the difficulty of consolidation.

C. School district size and its relationship to educational programs.

III. Topical Outline - (Continued)

4. If schools weren't doing a good job; why doesn't the President pass a law telling them what to do?

A. The U.S. Constitution on education.

1. Tenth Amendment

2. Review the concept of "federalism".

B. How does national law impact education, but not "direct" it?

1. "General Welfare" clause of the Constitution

2. Civil Rights: The XIV Amendment

3. Separation of Church and State: Article I

C. The federal role:

1. Protecting civil rights of students and educational personnel.

2. Gathering statistics on a national basis and disseminating same.

3. Supporting research and development

4. Categorical funding: Addressing critical national, educational priorities, e.g., student loans and grants, Head Start, innovation, desegregations, etc.

5. Does the federal government have a role to play in equalizing educational opportunities among the states?

III. Topical Outline - (Continued)

5. Why aren't schools the same across Michigan or the U.S.A.?

A. Responsibility of the "several states" and localities.

B. Really many similarities (more than differences?)

C. Local control responding to different community make-up.

III. Topical Outline - (Continued)

6. What does it cost to educate me?

A. Per pupil operational expense in this district.

B. Capital outlay (for building buildings) is also part of the cost.

C. Per pupil cost of nearby districts.

D. Why do districts vary so much?

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III. Topical Outline - (Continued)

7. The taxes on our house don't equal the cost for even me and I have two sisters, so where does the rest of the money come from?

A. State Aid formula

1. In-formula versus out-of-formula districts

B. Sources of state revenues for schools

C. Other sources of local financial support

D. Federal sources of support

E. Impact of good schools on property values

III. Topical Outline - (Continued)

8. My parents complain about school taxes on our house, what do they actually pay?

A. Calculating local property tax

B. Property tax as a proportion of actual cost of your (the students) education.

C. Portion of property tax that supports education versus other governmental services.

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III. Topical Outline - (Continued)

9. Is it fair to have people like my grandparents with no kids pay school taxes?

A. Senior Citizen "Circuit Breaker"

1. How elderly citizens are relieved of tax burden

B. Is it really unfair: How does Michigan's overall tax picture compare to other states?

C. Why quality schools are important to everybody

1. Public benefits

a. need for informed electorate

b. impact on business and industry

c. "Quality of Life" in any community

2. Private/personal benefits

a. you as an educated person--personal life quality

b. your career aspirations

III. Topical Outline - (Continued)

10. My folks sometimes complain about teachers salaries; What do we pay teachers and how does that compare with other jobs?

A. What proporation of the district budget is salaries?

B. What does the budget really include?

C. Are teachers salaries really out of line?

D. Education as a capital investment

IV. Background Reading For The Teacher:

The following pages provide some general background on the topic of financing and governance of public schools. It is by no means conclusive on the subject, but is merely an initial reference for the instructor.

Reason For The Study Unit:

Despite occasional specific differences on given issues, the American people do hold certain beliefs and values about the place and purpose of education in their lives, among which are the following:

a. In a democracy an educated citizenry is essential to the welfare of the local community, state and nation. This necessity is not only for citizenship competence but also for capability to contribute to and benefit from the economic system.

b. Education should be free to the individual at least through high school.

c. Because the state unit is large enough to have the resources but small enough to be responsive it is a better focus of responsiblity than the federal or local units of government.

d. Actual operation of schools, within state guidelines, is best done locally.

e. Public funds should not be used for private education, notwithstanding contemporary efforts to erode this principle.

f. The quality of educaton should be equal for all is a belief espoused, but difficult to implement because of inequities in financing. We continue to be unwilling to spread property tax revenues evenly throughout the individual states, let alone spreading the money across the entire nation.

Public education is uniquely vulnerable on the issue of financing, because it is the one area where the public can say no to taxation.

> "...our method of financing schools makes them the center of attention in relation to other forms of government. We pay for the F-15's (or whatever the lastest designation is) by keeping the money out of paychecks so people didn't ever know they had it--which of course, they didn't. We pay the governor's chauffeur and the mayor's social secretary the same way--through state and city income and payroll taxes which are withheld. But the tax bill for schools is right

IV. Reason For The Study Unit: - (Continued)

> out in the open where it hurts the most and is most highly visible. The property tax bill arrives at one of the worst times of the year, right after Thanksgiving and about the time Christmas shopping is in full swing. Naturally, it's always higher than the year before--much higher in fact, with inflation bouncing the cost of living ten percent each year. Since the city sends out its tax bills, which are lower in the summer, there is no doubt in anyone's mind what the winter tax money is for. On top of that you pay it every time you buy a tube of tooth paste via the sales tax, half of which is earmarked for school support. You pay your property tax to the city or township treasurer--local officials--and your sales tax to a local merchant."[1]

The high visibility of the financing naturally leads to critical questions of whether citizens are getting their money's worth and "who's running the show".

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[1]Carrol Munshaw, unpublished course syllabus, "The Structure of Education" Wayne State University, 1980.

The Federal Role:

During the period of the Articles of Confederation, important policies on education were formulated by the federal government in the Ordinance of 1785 and the Ordinance of 1787. There was no mention of education in the Bill of Rights. In the period of the first years of our country's existence, many theories of education were written with emphasis upon national control and federal support. But none of these plans came into fruition. In 1867 Congress established a Department of Education, without cabinet level, to be headed by a Commissioner of Education. But Congress limited its functions and gave it very little support.

In 1953 the combined Department of Health, Education and Welfare was established. In 1979 the Department of Education was created and the first Secretary of Education was sworn into office. The Secretary of Education advises the President with regards to educational plans, policies, and programs. The Secretary also directs the Department staff in administering congressional laws pertaining to education.

Crises such as the Great Depression, World War II, The Korean War, and Sputnik have stimulated the Federal Government to enact federal school aid legislation. Prior to World War I, Congress enacted such federal support legislation as the First and Second Morrill Acts, and the Smith-Hughes Vocational Education Act. During World War II and since, the following federal legislation has been enacted: the 1941 Lanham Act, the 1957 National Defense Education Act, the 1964 Elementary and Secondary Education Act, the 1968 Vocational Education Act, and the Education For All Handicapped Children Act. The effects of federal school aid policy can be seen in expanding educational opportunities for previously neglected population groups and in stimulating educational research and development. But regardless of all the federal aid legislation, the federal government allocates a considerably smaller percent of its funds for education than state or local governments.

Under the Constitution education was not delegated to the federal government but under the terms of the Tenth Amendment the function of education was reserved for the states and the people. The states in turn have delegated most of the financial and operating responsibilities to the school districts. All states except Hawaii have delegated the financial and operational educational responsibilities to local school districts. The federal government does not play a major direct role in education. The relationships of local school districts with the states far outweigh those with the federal government.

School Districts Defined:

State governments have created special governmental units called school districts and have given them the power to administer public schools. There are only a few school districts in the nation which are financially dependent upon municipal governments. "A school district is the basic governmental unit through which the exercise of local control of schools is effected. It is a unit of government, possessing quasi-corporate powers, created and empowered by state law to admnister a public school or a public school system."2 "...school districts are arms of state governments created to implement the mandates of the state and to ensure the rights and privileges-of free education to the people. School districts are the instruments through which the states can fulfill its Constitutional obligations; they are the legally established and authorized subdivisions of government constructed for the purpose of maintaining a system of public schools."3 "...a school district is not a municipal corporation; it is a quasi-corporation...is purely a political or civil division of the state; it is created as an instrumentality of the state in order to facilitate the administration of government."4 There are five types of school districts in America. They are state districts, county districts, town and township districts, common school districts, city units, and regional districts.

The main powers of the school district are the power to tax, the right to sue and be sued, the right to enter into contracts, and the responsibility to provide an educational system for the district. Elected governing boards control independent school districts. These governing boards in turn hire a superintendent to carry out their decisions. The superintendent hires a staff of educators to help him. In most states, the general supervision of public schools is delegated to a state board of education. The state board of education in turn assigns most of the administrative matters to a chief state school officer and a professional staff of the state department of education.

In Michigan the State Board of Education is responsible for supervising all public education, not including colleges. The Michigan State Board of Education may adopt rules and distributes federal education funds to more than 500 school districts. In addition to this it appoints the Superintendent of Public Instruction and oversees the Michigan Department of Education. Michigan has a problem with the boundaries of some of its school districts.

2Ronald F. Campbell, Luvern L. Cunningham, and Roderick F. McPhee The Organization and Control of American Schools. (Columbus, Ohio: Charles E. Merrill Books, Inc., 1965), p. 81, as found in Carrol Munshaw's course syllabus.

3Ibid., p. 88

4Newton, Edwards, The Course and the Public Schools. (Chicago: University of Chicago Press, 1955), p. 54, as quoted in Campbell, Cunningham, and McPhee, op. cit., as found in Munshaw.

Because township school districts preceded municipal incorporation in many cases, there is an overlapping of school district boundaries with city and village boundaries. As a result, you may have children living in the same city or village, but not attending the same school system.

Similarities and Differences:

There are many similarities in school districts across America in that you will find superintendents, school boards, elementary schools, principals, administrators, and classroom teachers. In addition, there is a remarkable resemblance in the basic curriculum, classroom and school day throughout many districts. However, in spite of the similarities there are important variances among school districts within states and between states. Finances largely create the differences among school districts. There are also differences in size and the student-population-make-up of districts. But most important are the differences in wealth, school tax rates, and revenues raised per pupil which determines the "richness" of programs. Each school district determines its ability to finance its schools largely by the revenue raised from property taxes. Exacerbating the problem even more is the fact that educational expenditures tend to increase at rates greater than inflation in spite of declining enrollments.

Some Michigan History:

The first fully organized school in Michian was at Raisinville in 1828. In 1829 the property of non-residents was made subject to taxation for schools in Michigan by the territorial legislature. In 1829 the territory passed a law that permitted the forming of primary districts. These districts had grades one through eight. Schools were supported by rate bills which was a tuition which parents of children paid for receiving instruciton. Each parent provided a certain amount of firewood to heat the school. There were no free schools in Michigan until 1842 and then only in Detroit. Thirty years went by before free education spread throughout the state. Teachers received their food and lodging from the parents of their students. Usually children of poor parents were permitted to attend free. Michigan became a state in 1837.

Michigan's first Constitution provided for a superintendent of public instruction and a system of common schools to be open at least three months a year. Financial assistance was to be provided by the state. But this was not a guarantee for free public schools. Rate bills were still used and the level of education differed in various districts. It also stated that any proceeds from land sales given by the Federal government should go into a perpetual fund and the interest used to maintain schools. The Constitution of 1850

stated that starting five years after the adoption of the Constituion, free schools were to be maintained at least three months each year. But in reality, rate bills were still being collected. Only in Detroit were free schools adopted. On April 3, 1869, the Legislature approved an act making free schools in Michigan a reality. Attendance increased, but still many children did not attend school. In the Kalamazoo case, with Justice Thomas M. Cooley writing the opinion, high schools were recognized as legitimate establishments under the school law. The compulsory attendance laws of 1883 and 1885 were not enforced, unfortunately.

By the turn of the century there was a considerable improvement in Michigan education, especially in the cities. Under a law of 1895, all children from seven to sixteen years of age had to attend school a minimum of four months out of the year. Each district appointed a truant officer to enforce this law. In 1905 a law passed setting compulsory attendance for a full term, the length of which was to be determined by each district. Prior to 1973 state aid in Michigan was provided under a series of foundation grant formulas determined yearly.

In 1973 the Bursley State Aid bill was passed with a "power-equalizing" formula. This was a step in the direction of equalizing the difference in taxable property between wealthy and poor districts. Though never fully realized, it is the basic "model" in use today.

The Shift From Local To State Control:

Local control of public institutions is one of the foundations of a democracy. In accordance with this fundamental belief, early American public schools were organized at the community level under the control of locally elected officials. But as time went on, especially in the present century, local communities have had to share public educational governance with district, state, and federal education agencies.

The balance of power in controlling education has gradually started to shift from local districts to the states especially since the passage of the ESEA Act of 1965 which embodied provisions for strengthening state department of education. In the 1970's states began to be concerned with school finance reform, minimum competency testing, categorical programs, and civil rights regulations.

As the percentage that education represents of state budgets increases, so does state control. (This topic of the shift in balance of power is well discussed in the November, 1984 issue of Phi Delta Kappan.)

Future Of School Finance In The States:

"There is no 'perfect' school finance formula; in fact, no one approach is universally accepted. Systems of school finance are designed to accomplish certain broad objectives, which vary among the states, and to respond to the history, the economics, and the political issues of each state. Each system of school finance reflects a political balance among:

-the availability of state support and local support;
-the achievement of statewide equity and local control;
-the need to fund 'basic' services and special, high-cost services;
-the need to support personnel costs and non-personnel costs;
-the desire to reimburse districts for actual expenditures and to provide incentives to improve quality or efficiency;
-the need to support current expenditures and capital expenditures;
-the desire to support public and private schools; and
-the desire to support elementary/secondary education and higher education.

In the future, states are likely to move in the following directions, though the extent of movement in a particular state will depend on the nature of its current aid system, the level of support it provides, and its political and economic climates.

1. State support for schools will stabilize or decline over the next few years, as local support increases. In a few states with very low levels of state support, state education aid may increase; by the same token, state aid could deteriorate in those states now providing between 50% and 75% of all support.

2. Property taxes will increase. Property taxes are a stable source of revenue, and their use, when combined with other taxes, will assure that adequate revenue is available for education. However, states will have to improve their property assessment systems in order to increase their reliance on property taxes.

Future Of School Finance In The States: - (Continued)

3. States will make their school finance formulas more sensitive to teacher salary levels. They will do this in order to ensure that salaries are adequate and to promote greater equity in salaries across school districts.

4. States will use their school finance systems to provide incentives for school improvement. Some portion of state aid will be distributed in response to school district behavior. Although this is not a new concept, the incentives will be explicit and school districts will have some choice about compliance.

5. Multi-tiered formulas will become more common; states will use such formulas to promote a wide range of objectives that cannot be promoted through use of a single formula. Different approaches will be used to promote adequacy, local choice, and improvements in quality.

6. A higher proportion of expenditures will be consumed by teachers, reversing the trend of the last decade. This will happen despite the use of new technological tools, because teacher salaries will rise and pupil/teacher ratios will not rise as enrollments begin to increase.

7. Spending variations among the states will be reduced, as low spending regions continue to invest in education. Spending variations within states will be reduced, as teacher salary levels are equalized over time.

8. Local control over spending will be reduced. As states become more involved in school improvements and as they tie teacher salaries to school finance systems, state control will increase."5

5John Augenblick, "The States and School Finance; Looking Back and Looking Ahead, "Phi Delta Kappan", November, 1984. p. 201.

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The most immediately accessible and pertinent source of data is your own local and intermediate school district policy manuals, fiscal reports and data summaries. Local officials will eagerly cooperate as data sources and resource persons for your secondary classrooms.

The changing nature of the "politics" of school governance and finance puts a premium on usage of very current sources such as major Michigan newspapers, the Michigan School Board Journal and pertinent articles in national periodicals such as Time, Newsweek, U.S. News and World Report, Education Digest and the National School Board Journal.

The following is merely a representative listing of sources to provide background for the instructor on the broader aspects of educational issues--particularly financial policy. Depending upon the ability of students extracts of this could be useful for class reports etc.

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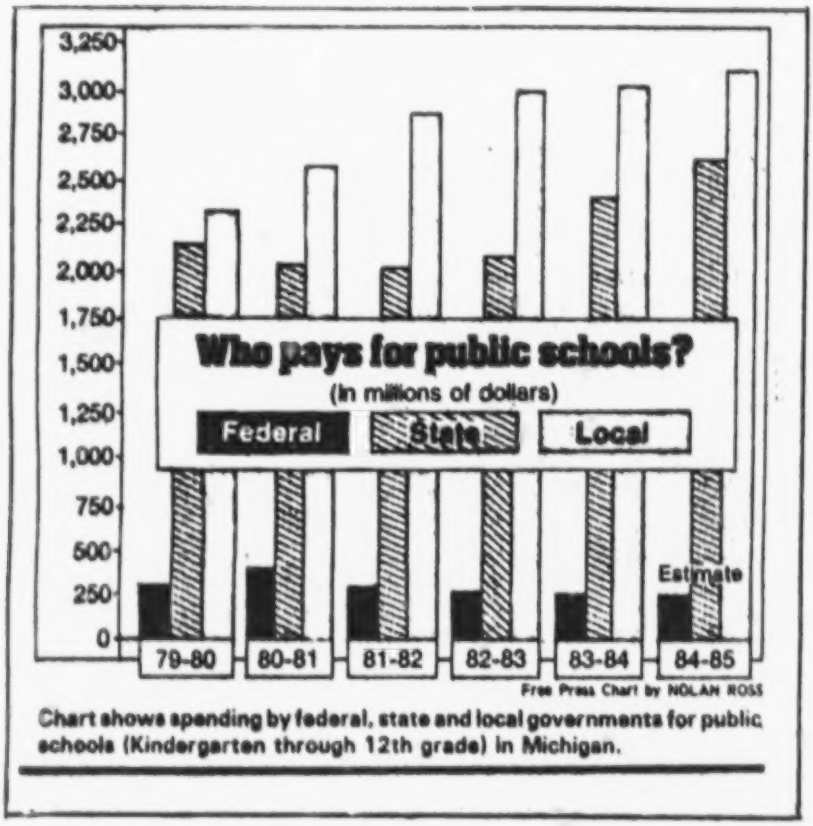

The graph above, from the January 23, 1985, The Detroit Free Press is an example of the helpful and current materials available to teach about the schools. It is common for such items to appear annually.

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